November 2-4, 2025
Grand Hyatt Scottsdale Resort, Scottsdale, AZ

Sunday, November 2

Start	End	Event
7:00 AM	1:30 PM	Optional Social Events
2:30 PM	7:30 PM	Badge Pickup
3:30 PM	4:30 PM	Meet, Greet & Eat Session
4:30 PM	6:00 PM	ITA Opening Session President's Welcome by Geni Whitehouse (30 minutes) KEYNOTE: What's Your Pink Cadillac? by Ryan Campbell (60 minutes)
6:00 PM	7:30 PM	Welcome Reception
7:30 PM		Dinner On Your Own and Various Partner Events

Monday, November 3

7:00 AM	8:00 AM	Breakfast
7:00 AM	5:00 PM	Badge Pickup
8:00 AM	10:00 AM	Monday Opening Session by Geni Whitehouse (30 minutes) KEYNOTE: The Stress Advantage by Rebecca Heiss (90 minutes)

TRACKS & SESSIONS		Consulting & Reselling (CR)		Client Accounting Services (CAS)	Internal Tech Leaders Sessions (ITL)	
		CR TRACK 1	CR TRACK 2	CAS	ITL STRATEGIC	ITL TACTICAL
10:30 AM	12:00 PM	The Next Ledger: AI Tools Reshaping Accounting Technology		Shaping the Future of Accounting: Trends, Innovation, and Growth	Platform Fatigue is Real: How to Consolidate Your Stack	
12:00 PM	1:15 PM	Lunch				
1:15 PM	2:45 PM	Inside the AI Toolbox: Real Examples, Real Results	What Should We Be Measuring? Evolving Metrics and Benchmarks for Performance	CAS 3.0: From Insights to Impact – The Future of Client Advisory Services	Insource or Outsource Security Ops	Beyond the Phish: Creative Ways to Drive Security Awareness
2:45 PM	4:00 PM	Growth Through Industry - Focused Solutions	Next in Line: Identifying and Developing Future Leaders in Flat Organizations	Future-Ready Talent - Building the Next Generation of Leaders	Tech Strategy Under New Ownership: Lessons from PE-Backed Firms?	Cyber Resilience: Preparing for the Inevitable
4:15 PM	5:15 PM	Owners Roundtable: Current State of ITA	Future Leaders Roundtable	Continuous Close, Continuous Insight	ITL Strategic Roundtable: AI Use Hype Versus Reality CIO (or designee) only	ITL Tactical Roundtable: AI Use Hype Versus Reality
5:30 PM	6:30 PM	ITA IGNITE by Mark Serverance *Beer and Wine will be provided*				
7:00 PM	9:00 PM	Dinner and Party				

Tuesday, November 4

7:00 AM	8:00 AM	Breakfast				
TRACKS & SESSIONS		Consulting & Reselling (CR)		Client Accounting Services (CAS)	Internal Tech Leaders Sessions (ITL)	
		CR TRACK 1	CR TRACK 2	CAS	ITL STRATEGIC	ITL TACTICAL
8:00 AM	9:15 AM	Economist KEYNOTE: Gearing Up for 2026 by Taylor St. Germain				
9:45 AM	11:00 AM	AI Confidential: Navigating Privacy, Licensing, and Risk in the Age of Artificial Intelligence		Crafting Unforgettable Client Journeys: Onboarding and Retention	Client Expectations Are Changing: How to Show You're Secure	Rethinking the IT Procurement Process: From Gatekeeper to Partner/ Contract Management
11:15 AM	12:30 PM	Owners Roundtable Continued: Future of ITA	Project Management Realities: Navigating Shifting Timelines and Team Workloads	Culture, Collaboration & CAS: The Future of Global Team Leadership and Developing Multigenerational Teams	Product Development & Product Management in Public Accounting Firms	Securing the Hybrid/Remote Firm: Best Practices, Tools and Policies for Protecting Hybrid Work Environment
12:30 PM	1:30 PM	Lunch				
1:30 PM	2:45 PM	Improving Customer Retention: Driving Growth with Data	Winning the Talent War: Retention Strategies in a Changing Landscape	CAS Fireside Chat	ITL Strategic Roundtable CIO (or designee) only	ITL Tactical Roundtables
2:45 PM	3:15 PM	Collaborative Wrap up session - Geni Whitehouse				

Wednesday, November 6

8:30 AM	3:00 PM	ITA Leadership Alliance (ILA) Base Camp (Note: Separate Registration Required)

Consulting & Reselling - CR
Internal Technology Leader Tactical - ITL-T
Internal Technology Leader Strategic - ITL-S
Client Accounting Services - CAS

Sunday, November 2 - 4:30 to 6:00 pm - Welcome and Sunday Keynote

4:30 – 4:45 pm
President's Welcome & Introductions
Room: TBD

Geni Whitehouse – ITA President, Napa, CA

ITA President Geni Whitehouse will introduce our Fall Collaborative Committees and welcome our new members and guests. She will also provide an overview of the Fall Collaborative agenda prior to introducing our Sunday night keynote speaker.

4:45 – 6:00 pm
KEYNOTE: What's Your Pink Cadillac?
Room: TBD

Ryan Campbell – Mental Health & Resilience Keynote Speaker & Author, Nashville, TN

What's Your Pink Cadillac? The Transformational Power of Prioritizing Joy Dive into the joy-fueled resilience hidden in our hobbies, interests, and simple pleasures. In a fast-paced world where our challenges are relentless and the solutions seem out of reach, Ryan delivers a message of accessible, attainable change. From the highs of a world record-breaking expedition to the most unimaginable low of a plane crash and paraplegic diagnosis, Ryan uses his story to highlight the realities of adversity and the role of resilience. A message built on the importance of mental health and self-care, What's Your Pink Cadillac? uncovers the most unexpected, transformational tool discovered in the most unexpected place, the purchase of a 1960 Pink Cadillac.

Get ready to smile like a kid, step back and show up better.

Monday, November 3 – 8:00 – 10:00 am - Monday Morning General Session & Keynote

ALL
8:00 – 8:30 am
President's Opening Remarks
Room: TBD

Geni Whitehouse – ITA President, Napa, CA

ITA President Geni Whitehouse will introduce our Fall Collaborative Committees and share opportunities for participation. Geni will give an overview of the ITA Leadership Academy (ILA). Geni will share some other exciting ITA Events and plans.

ALL
8:30– 10:00 am
KEYNOTE: The Stress Advantage
Room: TBD

Rebecca Heiss – Stress Physiologist & Keynote Speaker, Greenville, SC

We've gone through pandemics, supply chain issues, and uncertainty in global markets and now it's time to get back to work. What if instead of trying to fight stress, we could transform it into a competitive advantage?
In this eye-opening keynote, Dr. Rebecca reveals the secret upside of stress that the highest-performing athletes and leaders use to fuel their performance. Helping to move individuals and companies from symptoms of PTSD to PTG (Post Traumatic Growth), she

shares her simple science-based framework that allows anyone to stop fighting stress, and start leaning into it – improving productivity, increasing connection to others, and growing through challenge

Monday, November 3 - 10:30 am 12:00 pm

CR – ALL

The Next Ledger: AI Tools Reshaping Accounting Technology

Room: TBD

Brian Tankersley

Artificial Intelligence is rapidly transforming the accounting technology landscape, introducing new efficiencies and reshaping how firms and clients use financial systems. This 90-minute course explores the latest AI tools in accounting, from ERP integrated intelligence to add-on applications, AI-driven general ledgers, and emerging agentive AI technologies. Attendees will learn how AI enhances data accuracy, accelerates conversions, and supports advanced decision-making. Designed for software resellers and CPAs at large firms, this session will help participants identify which tools offer practical value today and how to position themselves for the opportunities AI creates in client service and accounting technology solutions.

Major Topics:
• AI-enhanced ERP and add-on accounting applications
• AI-based general ledger and agentive AI tools
• AI-driven data conversion and migration

By the end of this session, participants will be able to:
• Analyze the capabilities of ERP platforms and add-on applications that incorporate AI functionality.
• Differentiate between traditional general ledger systems and new AI based general ledger products.
• Evaluate the potential uses of agentive AI tools for automating accounting workflows.
• Assess how AI can be applied in data conversion and migration processes to reduce risk and errors.

CAS – ALL

Shaping the Future of Accounting: Trends, Innovation, and Growth

Room: TBD

Kim Blascoe – CPA.com, Sr. Director CAS Professional Services, New York, NY

Todd Cooper - CPA.com, Director, Channels, Durham, NC

The accounting profession is evolving at a rapid pace, driven by shifting client expectations, emerging technologies, and changes across industries. This session will explore the latest industry trends shaping the broader marketplace, with a particular focus on how these forces are influencing the evolution of client advisory services (CAS). We will highlight current CAS trends, from technology adoption to service model innovation, and provide insights into where both the profession and CAS are headed in the future. Participants will walk away with a clearer perspective on the external factors impacting firms, the opportunities for CAS to deliver greater value, and practical considerations for positioning their practices to thrive in a rapidly changing environment.

Learning Objectives
• Recall key industry trends influencing the accounting profession today.
• Recognize how current CAS trends reflect broader market dynamics.
• Identify future opportunities for CAS to expand its impact and relevance.
• Recognize the strategic role CAS plays in driving firm growth and client value.

ITL – ALL

Platform Fatigue is Real: How to Consolidate Your Stack

Room: TBD

Presenter - TBD

Session Description TBD

Monday, November 3 – 1:15 – 2:30 pm

CAS – ALL
CAS 3.0: From Insights to Impact – The Future of Client Advisory Services
Room: TBD

Gregg Landers – CBIZ MHM, Director of CAS, Consulting & Internal Control Servies, San Diego, CA

See how CR and VAR firms are using AI right now to boost efficiency and client services. Join the conversation, share ideas, and leave with real takeaways you can put into action.

CR-1
Inside the AI Toolbox: Real Examples, Real Results
Room: TBD

Presenter - TBD

Session Description TBD

CR – 2
What Should We Be Measuring? Evolving Metrics and Benchmarks for Performance
Room: TBD

David Hofferberth – Managing Director, Liberty Township, OH

Session Description TBD

ITL – S
Insource or Outsource Security Ops
Room: TBD

Presenter - TBD

Session Description TBD

ITL – T
Room: TBD

Joshua Schmidt – BPM, Partner

Beyond the Phish: Creative Ways to Drive Security Awareness

Most firms run phishing simulations, but real security awareness requires more than clicking on emails. This session explores fresh, practical approaches mid-size and small firms can use to build a culture of security.

Session will cover:
• Tools that make training more engaging and less of a checkbox exercise
• Creative campaigns that get colleagues talking about security in everyday work
• Ways to measure impact and keep awareness from fading over time

You'll leave with actionable ideas, examples from peer firms, and strategies you can tailor to your team, no large budget required.

Monday, November 3 – 2:45 – 4:00 pm

CR – 1
Growth Through Industry-Focused Solutions
Room: TBD

How do you stand out in a crowded market? By going deeper into industry expertise. This interactive session will explore how to build industry-focused solutions, leverage demo data, and showcase true subject-matter expertise—with a spotlight on verticals like Food and Cannabis. We'll discuss how to create IP around your solutions, position yourself as the go-to expert, and drive real growth.

The session kicks off with a panel discussion, followed by table leader breakouts where participants will dive into curated questions and share perspectives. You'll leave with practical ideas, proven strategies, and new connections to help you elevate your industry approach.

CR – 2
Next in Line: Identifying and Developing Future Leaders in Flat Organizations
Room: TBD
> *Presenter - TBD*

Session Description TBD

CAS - ALL
Future – Ready Talent – Building the Next Generation of Leaders
Room: TBD
> **Moderator:**
> *John Pace – Partner & Director Outsources Accounting & Advisory Services, Bethesda, MD*
> *Heidi Grindle – CLA, CAAS Nonprofit Principal, Minneapolis, MN*

As technology reshapes the accounting landscape, firms must rethink how they hire, train, and scale. This session explores how firms are upskilling accountants to meet evolving demands, whether the right mix of majors is being recruited, and how automation and the use of global teams is influencing talent strategy. We'll dive into developing future CAS leaders with high-EQ and strategic thinking skills and share best practices for building the next generation of leaders. A panel of speakers, along with a collaborative roundtable, will showcase real-world upskilling plans as firms consider their next steps.

ITL – S
Tech Strategy Under New Ownership: Lessons from PE-Backed Firms?
Room: TBD

industry, bringing new expectations around speed, scale, and accountability. For technology leaders, this shift affects everything from budgeting and vendor management to talent strategy and board-level reporting.

In this panel, IT leaders from PE-backed firms will share how their roles have evolved, what's changed in their day-to-day operations, and how they're aligning technology strategy with investor goals. Whether you're newly backed or preparing for investment, this session offers practical insights and peer-tested strategies.

Learning Objectives:
• 	Understand how private equity influences IT priorities, governance, and performance metrics.
• 	Learn how to prepare for the due diligence phase as well as understand what changes need to be made to accommodate the alternative practice structure.
• 	Identify strategies for balancing innovation with cost discipline under PE ownership.
• 	Gain insights into aligning IT strategy with PE-driven growth goals, including M&A readiness and scalability.
• 	Discover best practices for communicating with PE stakeholders and adapting to new reporting structures.

ITL – T
Cyber Resilience: Preparing for the Inevitable
Room: TBD
> *Presenter - TBD*

Session Description TBD

Monday, November 3 – 4:15 – 5:15 pm

CR-1
Owners Roundtable – Current State of the ITA
Room: TBD
> *Walt Goodfield – RKL eSolutions, Chief Business Officer, Lancaster, PA*

Session Description TBD

CR-2

Future Leaders Roundtable
Room: TBD

Presenter - TBD

Session Description TBD

CAS – ALL

Continuous Close, Continuous Insight
Room: TBD

Speaker TBD

This session highlights the current wave of AI-native and AI-enhanced accounting platforms looking to reshape CAAS. We'll look at new general ledgers like Rillet, Digits, and Puzzle, alongside additional automation tools built for CAAS teams. Latest enhancements from Intuit, Sage, and/or BILL will also be covered, with a focus on what CAAS leaders should monitor and stay ahead of to prepare for continuous close and continuous insight.

ITL-S

ITL Strategic Roundtable: AI Use Hype Versus Reality *(CIO or designee only)*
Room: TBD

Presenter - TBD

Session Description TBD

ITL – T

ITL Tactical Roundtable: AI Use Hype Versus Reality
Room: TBD

Facilitator(s) TBD

The ever-popular ITL Tactical Roundtables for this Fall Collaborative will be those listed above along with the Table Leaders. Discussion topics will be provided for each table…or feel free to branch out on your own!

- Infrastructure:
- Service Delivery, Metrics and Support:
- Security / Compliance:
- App Dev:
- Project Management

Monday, November 3 – 5:30 – 6:30 pm

ALL

IGNITE
Room: TBD

Mark Severance – RKL eSolutions, Director of Cloud Sales, Simi Valley, CA

"Ignite" is back on the agenda! Ignite talks are creative, enlightening, and a perfect opportunity to live the ITA motto – Knowledge Increases in Value When It Is Shared. The concept of Ignite is where you'll see a few of our ITA members come up on stage and give 5 minute presentations about something personal or professional that they are passionate about. The concept of Ignite is to "Enlighten us but make it quick!" In prior ITA Ignite sessions we learned binder clip hacks, the joys and perils of taking risks, cycling's rules of the road, supporting and hiring US vets, men with brooms and a variety of other useful (and useless) topics. The whole idea behind Ignite is to learn something new about your ITA members in a fun and informal way. And beer and wine will be served!

Tuesday, November 4 – 8:00 – 9:15 am *KEYNOTE*

ALL

Economist Keynote: Gearing Up for 2026
Room: TBD

Taylor St Germain – ITR Economics, Economist, Senior Business Consultant & Speaker, Castle Rock, CO

Business cycle conditions are set to generally improve in 2026 (and beyond). It is important to know how much rise to expect, and for how long, for the general economy and specifically by markets. Additionally, we expect inflation pressures to heat up beginning in 2026 and in the following years. Beyond looking at the drivers of that inflation, we will present how much inflation to expect, and how high interest rates are likely to go through 2027. Not all markets and businesses are interest-rate sensitive. We will be looking at different relevant markets with an eye towards gauging how much of a headwind rising interest rates will present.

Earlier-turning segments of the economy will need to know how soon they will likely experience business cycle degradation and to what extent. The presentation will cover markets specific to the audience along with ITR Economics' outlook through 2027 for inflation, interest rates, downside risks, upside potential, and ITR Economics' extended outlook for the 2030s where appropriate.

Tuesday, November 4 – 9:45 – 11:00 am

CR - ALL
AI Confidential: Navigating Privacy, Licensing, and Risk in the Age of Artificial Intelligence
Room: TBD
> *Presenter - TBD*

This session explores the intersection of artificial intelligence, software licensing, and data privacy. Participants will gain practical insights into how generative AI systems interact with confidential data, the implications of software license agreements and privacy policies, and the evolving regulatory landscape. Through real – world examples and analysis tools, attendees will learn how to evaluate risks, interpret complex legal documents, and implement responsible AI practices in their organizations.

Major Topics:
- Tools for evaluating and summarizing licenses and privacy policies
- Definitions of major terms and concepts which are used in software licenses
- Review key terms associated with major services like Microsoft 365 or QuickBooks Online
- Use ChatGPT and similar engines to summarize these agreements in a standardized format

Learning Objectives:
- Identify tools and techniques for analyzing software license agreements and privacy policies.
- Define key legal and technical terms commonly found in EULAs, ToS, and privacy policies.
- Evaluate the privacy implications of using AI systems, including risks of data leakage and misuse.
- Apply frameworks such as the NIST AI Risk Management Framework to assess and mitigate AI-related risks.

CAS – ALL
Crafting Unforgettable Client Journeys: Onboarding and Retention
Room: TBD
> *Presenter - TBD*

In today's competitive landscape, delivering an exceptional customer experience is critical for accounting and advisory firms to attract and retain clients. This session will explore proven strategies for creating seamless onboarding processes and fostering long-term client relationships. Attendees will learn how to design client-centric onboarding workflows that set clear expectations, build trust, and streamline communication from the first interaction. We'll also dive into best practices for nurturing existing clients, including proactive engagement, personalized advisory services, and leveraging technology to enhance client satisfaction.

ITL-S
Client Expectations Are Changing: How to Show You're Secure
Room: TBD
> *Presenter - TBD*

With client expectations rising and regulations tightening, firms can't just be secure they need to prove it. In this session, we'll dive into what clients now look for when evaluating their firm's security posture.

Session will cover:
- How to communicate security practices in ways that resonate with clients
- Practical steps to demonstrate compliance and readiness without overcomplicating it
- The evolving role of certifications, attestations, and third-party tools in client conversations

Attendees will leave with strategies to position their firm as a trusted partner by making security visible, understandable, and part of the client experience.

ITL – T
Rethinking the IT Procurement Process: From Gatekeeper to Partner/ Contract Management
Room: TBA
Presenter - TBD

Procurement in IT has shifted from saying "no" to enabling smarter, safer choices. For accounting firms, this means balancing innovation, cost control, and risk management all while building stronger vendor relationships.

This session explores:
- Moving from gatekeeping to partnership with business stakeholders
- Practical approaches to contract review and vendor accountability
- Tools and tactics to streamline procurement while protecting the firm

You'll walk away with a framework for turning procurement into a strategic advantage rather than a roadblock.

Tuesday, November 4 – 11:15 am – 12:30 pm

CR-1
Owners Roundtable Continued – Future of ITA
Room: TBA
Walt Goodfield – RKL eSolutions, Chief Business Officer, Lancaster, PA
Session Description TBD

CR – 2
Project Management Realities: Navigating Shifting Timelines and Team Workloads
Room: TBA
Presenter - TBD
Session Description TBD

CAS – ALL
Culture, Collaboration & CAS: The Future of Global Team Leadership and Developing Multigenerational Teams
Room: TBD
Michelle Voyer – Cohn Reznick, Director Client Advisory Services, Boston, MA
Aaron Ackerman – Hogan Taylor, Partner, Practice Leader, Oklahoma CIty, OK

How do you lead effectively when your team spans Baby Boomers to Gen Z, cultural perspectives differ widely, and remote and hybrid work are persistent trends? The answer lies not in minimizing differences, but in leveraging them. Join this interactive panel-led discussion with group breakouts as we unpack the dynamics of multi-generational, multi-cultural teams in CAS. Participants will engage in open discussions and acquire practical strategies and thoughtful methods for creating harmonious workplaces where diversity drives success.

ITL – S
Product Development & Product Management in Public Accounting Firms
Room: TBD
Presenter - TBD
Session Description TBD

ITL – T
Securing the Hybrid/Remote Firm: Best Practices, Tools and Policies for Protecting Hybrid Work Environment
Room: TBD
Lock Langdon – Aprio, VP, CISO, Atlanta, GA
Pope Davis – Aprio, VP of Infrastructure & Operations, Atlanta, GA

Hybrid and remote work have erased the traditional perimeter. This session shares Aprio's past, current, and future strategies for a borderless approach that continuously verifies identity, device, and context across cloud, on-prem, and hybrid resources. We will

recap early wins that enabled "be anywhere" delivery, detail today's program, and preview our roadmap for policy-as-code, identity threat detection and response, and data-centric controls at scale. Throughout, we will show how these controls support our existing business, AI adoption, and continued M&A growth strategy.

Tuesday, November 4 – 1:30 – 2:45 pm

CR-1
Improving Customer Retention: Driving Growth with Data Using Data
Room: TBD
> *Presenter - TBD*

Struggling to keep your best customers engaged? In this hands-on workshop, we'll show you how to turn raw data into powerful retention strategies. Learn how to score and grade your customers, define the right outreach for each segment, and unlock hidden growth opportunities. Walk away with actionable frameworks to elevate customer experience, boost loyalty, and accelerate long-term revenue growth.

CR - 2
Winning the Talent War: Retention Strategies in a Changing Landscape
Room: TBD
> *Presenter - TBD*

Session Description TBD

CAS – ALL
CAS Fireside Chat
Room: TBA
> *Presenter - TBD*

Session Description TBD

ITL – S
ITL Strategic Roundtable *(CIO or designee only)*
Room: TBD
> *Presenter - TBD*

Session Description TBD

ITL Tactical Roundtables
Room: TBA
> *Facilitator(s) TBD*

The ever-popular ITL Tactical Roundtables for this Fall Collaborative will be those listed above along with the Table Leaders. Discussion topics will be provided for each table…or feel free to branch out on your own!
- Infrastructure:
- Service Delivery, Metrics and Support:
- Security / Compliance:
- App Dev:
- Project Management

Tuesday, November 4 – 2:45 – 3:15 pm

ALL
Collaborative Wrap Up
Room: TBA
> *Geni Whitehouse – ITA President, Napa Valley, CA*

Combined General Wrap up session

NASBA Registry Information

Credit Hours: Up to 15.2 hours of CPE available. Basis: CPE credits are granted on a 50-minute hour. After the first hour, sponsors can report one-fifth-credits. **However,** one-fifth-credits are not allowed / approved in all states. If half-credits are **not** allowed, participants need to round back to the last full credit.

Learning Objective: Depending upon the sessions you choose to attend, you will learn best practices and hear what other industry leaders are doing with respect to: current and emerging technologies, practice and project management, staffing, marketing, and customer/client service.

Program Content: The program m will feature tracks of educational content: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and perhaps others. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member clients or their businesses to be more successful.

Field of Study:
Business Management and Organization

Level – Update
Prerequisites – Minimum 3 Years as an Accountant, IT Consultant or Technician
Advance Preparation – None
Instructional Delivery Method – Lecture & Discussion

NASBA Registry of CPE Sponsors
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